

14th Annual

Maine

TAX FORUM

November 3 - 4, 2010
Augusta Civic Center



presented by:

Maine Revenue Services



**Internal
Revenue
Service**



Make your reservations early.

Seating is limited

(Registrations will be processed in the order they are received)

Who Should Attend?

Tax Professionals, Accountants, Enrolled Agents, CPAs, Tax Attorneys, Financial Planners and others who need to keep informed of changing and existing tax laws. CPE and CLE credits are available.

Location, Dates and Times

Augusta Civic Center

Wednesday, **November 3**, 8:30 am - 4:20 pm

Thursday, **November 4**, 8:15 am - 4:10 pm

Professional Education Credits - *ESTIMATED*

(Pending Board approval)

16 hours of CPE credits (including 2 hours of ethics)

or

12 hours of CLE credits (including 1.75 hours of ethics)

Fee

\$55 per day for each registrant, includes tuition, refreshments, lunch and Forum materials. Payments are nonrefundable after September 17, 2010.

For information, call or write:

Rose Jackson

(207) 626-8463

email:

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Heather Colfer

(207) 626-8478

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Maine Revenue Services

P.O. Box 9107

Augusta, ME 04332-9107

November 3: Income Tax

7:45 **REGISTRATION and COFFEE**

8:30 **Welcome**

Hosts:

Dennis M. Doiron, Director
Income/Estate Tax Division
Maine Revenue Services

J. Peter Gilbert, CPA
Associate Professor of Accounting
Thomas College

Joseph M. Wynne, Area Manager
New England Small Business/Self Employed Division
Internal Revenue Service

8:45 **FEDERAL Income Tax Developments:** Moderator - **Henry G. Rinker**, CPA,
Baker Newman & Noyes, Portland, ME

Federal Business and Individual Income Tax Developments

Robert B. Ravenelle, Esq.
Pierce Atwood LLP, Portland, ME

Christine B. Worthen, Esq.
Eastern Maine Healthcare Systems, Brewer, ME

Stuart D. Lyons, CPA, MST, MBA
Baker Newman & Noyes, Portland, ME

M. Jean McDevitt, JD, EA
Baker Newman & Noyes, Portland, ME

Alyson deWildt, CPA, MST
Berry Dunn McNeil & Parker, Bangor, ME

10:15 **BREAK**

10:35 **Federal Income Tax Developments, continued**

12:00 **LUNCH**

1:00 **Keynote Speaker**

Governor John Elias Baldacci
State of Maine

2:00 **BREAK**

2:20 **MAINE Tax Developments**

Maine Income Tax
Robert A. Creamer, Associate
Pierce Atwood LLP, Portland, Maine

Maine Sales Tax
Peter B. Beaulieu, Director
Maine Revenue Services, Augusta, Maine

Maine Property Tax
David P. Ledew, Director
Maine Revenue Services, Augusta, Maine

Electronic Services
Judith K. Whitten, Director
Maine Revenue Services, Augusta, Maine

4:20 **CLOSE**

4:30 **Thomas College Reception** - Stop by for hors d'oeuvres, visit with tax product vendors, and network with your professional colleagues.

November 4 - Session I

7:45 **REGISTRATION and COFFEE**

8:15 **SESSION I OPTIONS** - Choose either Session I-A, Session I-B or Session I-C below

8:15 **Choice of Entity (Partnership, LLC, S-corp, C-corp)**

I-A

Kenneth Stafford, CPA, MST
Stafford Advisors
Falmouth, Maine

8:15 **Nexus Issues - Income & Sales Tax**

I-B

George S. Isaacson, Esq.,
Partner, Brann & Isaacson
Lewiston, ME

John S. Petzinger, Esq.
Ohio Department of Taxation
Columbus, OH

Martin I. Eisenstein, Esq.
Partner, Brann & Isaacson
Lewiston, ME

Jennifer Gilman, Esq.
City of Seattle
Seattle, WA

Matthew P. Schaefer, Esq.
Partner, Brann & Isaacson
Lewiston, ME

Additional panelists to be determined

8:15 **IRS Initiatives** *(Note this Session will be repeated at 10:20am)*

I-C

**New Requirements for Tax Return Preparers, Mandatory e-filing rules,
E-services and Disclosure Program/Rules**

Shawn S. Savage, Sr. Stakeholder Liaison
Small Business/Self Employed Div.
Internal Revenue Service

Rhonda O'Reilly, IRS Disclosure Manager
Disclosure Office 1, Northeast Area
Internal Revenue Service

10:00 **BREAK**

November 4 - Session II

10:20 SESSION II OPTIONS - Choose either Session II-A, Session II-B or Session II-C below

10:20 Case Law Developments

II-A

David Bertoni, Esq.
Brann & Isaacson
Lewiston, Maine

Elizabeth High, Esq.
LeBlanc & Young
Portland, Maine

Scott Boak, Assistant Attorney General
Attorney General's Office
Augusta, Maine

10:20 Nexus Issues, continued

II-B

George S. Isaacson, Esq.
Partner, Brann & Isaacson
Lewiston, ME

John S. Petzinger, Esq.
Ohio Department of Taxation
Columbus, OH

Martin I. Eisenstein, Esq.
Partner, Brann & Isaacson
Lewiston, ME

Jennifer Gilman, Esq.
City of Seattle
Seattle, WA

Matthew P. Schaefer, Esq.
Partner, Brann & Isaacson
Lewiston, ME

Additional panelists to be determined

10:20 IRS Initiatives *(Note this is a repeat of Session I-C)*

II-C

**New Requirements for Tax Return Preparers, Mandatory e-filing rules,
E-services and Disclosure Program/Rules**

Shawn S. Savage, Sr. Stakeholder Liaison
Small Business/Self Employed Div.
Internal Revenue Service

Rhonda O'Reilly, IRS Disclosure Manager
Disclosure Office 1, Northeast Area
Internal Revenue Service

12:00 **LUNCH**

November 4 - General Session

AFTERNOON GENERAL ASSEMBLY

Main Auditorium

1:00 **Featured Speaker**

2010 Initiatives of the Taxpayer Advocacy Service

Matthew Weir, Executive Director, Case Advocacy
Internal Revenue Service, Taxpayer Advocate's Office

2:00 **BREAK**

2:20 **Ethics - Confidentiality & Other
Key Professional Standards**

Peter L. Chandler, CPA, JD, LL.M.
Baker Newman & Noyes, Portland, ME

Jacqueline L.L. Gomes, Esq.
Maine Board of Overseers of the Bar, Augusta, Maine

This segment qualifies for
professional responsibility credit

4:10 **CLOSE**

2010 MAINE TAX FORUM REGISTRATION FORM

You may also download a registration form at www.maine.gov/revenue

Reasonable accommodations will be made for attendees with disabilities. Please notify us as far in advance of the forum date as possible to request any special accommodations.

Last Name First Middle Initial

Email Address Agency/Company Name

Address

City State Zip Work Phone Number

☐ Contact information will be shared with tax product vendors attending the forum.
Check here if you do **not** want us to share your name, address or email information.

Please indicate the session(s) you plan to attend:

Day 1

Federal/State Tax
Developments

☐

Day 2 Breakout Sessions:

Session I
(choose one)

☐

I-A

☐

I-B

☐

I-C

Session II
(choose one)

☐

II-A

☐

II-B

☐

II-C

Afternoon General
Session

☐

Attendance Fee

☐ \$55.00 One day (per participant)

☐ \$110.00 Two day (per participant)

Professional Education Credits

☐ Check here if you would like a CPE certificate

☐ Check here if you would like a CLE certificate

Payment Information (check one box)

☐ Credit Card (circle one below)

MasterCard | VISA | Discover

☐ Check enclosed



Credit Card Account #: _____

Expiration Date: _____ Signature: _____

Register early, space is limited. Payments are nonrefundable after September 17, 2010. Please make checks payable to: Treasurer, State of Maine. **Mail to: Maine Revenue Services, P.O. Box 9107, Augusta, ME 04332-9107.** For additional registrations, copy this form.

2010 Highlights

- ◆ Tax product vendors will be on-site.

November 3

- ◆ **Keynote Speaker:**
Governor John E. Baldacci, State of Maine
- ◆ **Reception hosted by Thomas College from 4:30pm - 6:00pm.** Please stop by for hors d'oeuvres, visit with tax product vendors, and network with your professional colleagues.

November 4

- ◆ **Choice of 6 concurrent breakout sessions, including a special two-part breakout session on multistate nexus issues.**
- ◆ **Featured Speaker:**
Matthew Weir, Executive Director Case Advocacy, Internal Revenue Service
- ◆ **Ethics:**
Peter L. Chandler, Baker Newman & Noyes
Jacqueline L.L. Gomes, Maine Board of Overseers of the Bar